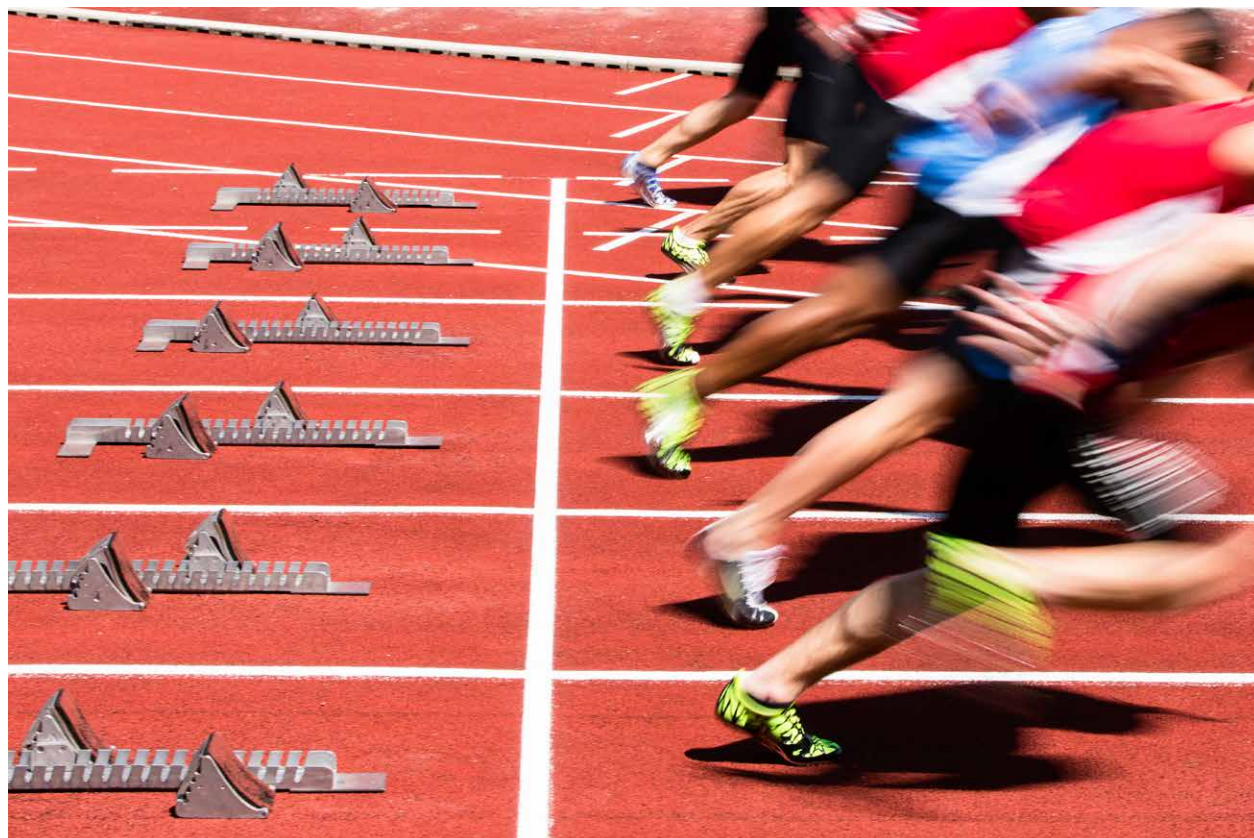


DT PRACTICE

PRACTICE MANAGEMENT SOFTWARE



DTPractice.ca



THOMSON REUTERS™

DT PROFESSIONAL SUITE FROM THOMSON REUTERS

POWERFUL. PRODUCTIVE. PROFITABLE.

The DT Professional Suite combines powerful data sharing, paperless processing, and online convenience to help you achieve a more productive and profitable practice. After all, when you're able to customize just the right mix of suite solutions for your firm, you can do some amazing things—like streamline firm workflow, strengthen client ties, and maintain a competitive edge. And that's pretty powerful stuff.

Keep reading to go beyond time and billing and experience the power of advanced practice management with DT Practice.

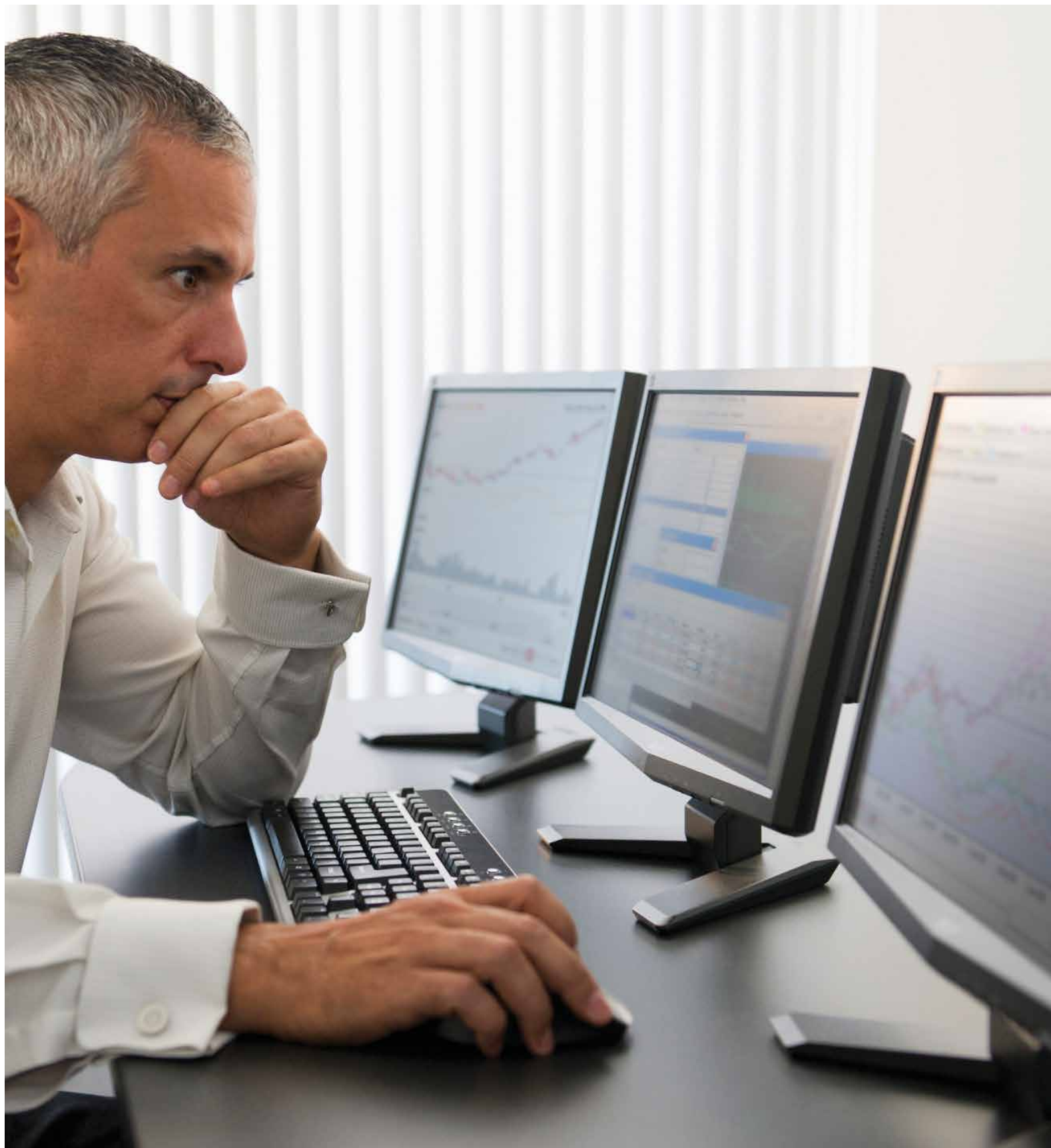


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Visit DTPractice.ca to learn more.



DT PRACTICE

TOTALLY INTEGRATED WORKFLOW MANAGEMENT

The DT Professional Suite offers the Canadian tax and accounting community the proven power and reliability of Practice CS, the hub of Thomson Reuters' DT Professional Suite of product, and used by thousands of firms across the United States. While core functionality has remained the same, DT Practice has been customized for the Canadian market and integrates with other products in the DT Professional Suite.

Setting a new standard for practice management systems, DT Practice offers a unique big-picture perspective that provides valuable insight into your business, guarantees unprecedented client service, and ensures that your firm runs at peak productivity. With its advanced "digital dashboard" approach, DT Practice provides real-time status information about your firm, clients, and staff. And DT Practice offers completely integrated workflow processes—by integrating with the DT Professional Suite, data in other programs is automatically captured as work progresses and updated in DT Practice.

DT Practice redefines practice management software, enabling you to:

- Streamline your entire workflow process.
- Serve clients more efficiently and effectively.
- Achieve maximum productivity and profitability.

DT Practice combines all of the tools and resources you need to ensure that you are in complete control of those activities that lead to greater productivity and profitability. Much more than a time and billing system, DT Practice serves as a workflow hub for your firm, bringing together all of the key information and resources you need to manage your practice. You can even take your practice with you via a unique practice management mobile app and improve your clients' service experience with secure client portals. Best of all, DT Practice has dozens of customizable features that can easily be modified to suit the individual needs of your firm—rather than requiring you to modify your firm to fit the program.

With DT Practice, you have the power to eliminate clutter and centralize all of your day-to-day processes to ensure that your most important tasks and information are always at your fingertips.



Multiple Innovation Award Winner—Practice CS and Staff Management

The *CPA Practice Advisor* gave objective recognition to Practice CS in 2007 and the Staff Management module for Practice CS in 2010, acknowledging our ongoing commitment to enhance our software with advanced technology and smart design for increasing the productivity and profitability of practicing accountants.

PRACTICE CS

★★★★★

EARNs 4.75 STAR RATING OVERALL

The CPA Practice Advisor
August 2012

"Practice CS offers a comprehensive system designed to manage and track multiple facets within an accounting firm. Although built for small to medium size firms, Practice CS is fully scalable from a sole practitioner to firms employing 1,000 or more employees in multiple locations. As part of the CS Professional Suite, Practice CS offers strong integration with fellow CS Professional Suite products, but also works exceptionally as a standalone product."

INTUITIVE INTERFACE

ACCESS CRITICAL INFORMATION ANYTIME, ANYWHERE

Unlike any other practice management system, DT Practice brings together all aspects of your practice to provide a truly integrated workspace. With its four customizable digital dashboards that let you monitor key information specific to your firm, clients, and staff, DT Practice streamlines workflow and drives efficiencies in all of your tasks.

Within each dashboard is a collection of portlets that provide snapshot views of the critical, real-time information you need to run your practice. These portlets include data such as email, billing summaries, receivables, staff availability, and much more. In addition to providing a quick view of key information, portlets serve as convenient links to additional resources within your firm—including frequently accessed programs, website links, and documents.

If you use DT FileCabinet, you can also access all of your electronic documents in seconds, using the convenient DT FileCabinet that is available in the Firm, Client, and Staff digital dashboards.

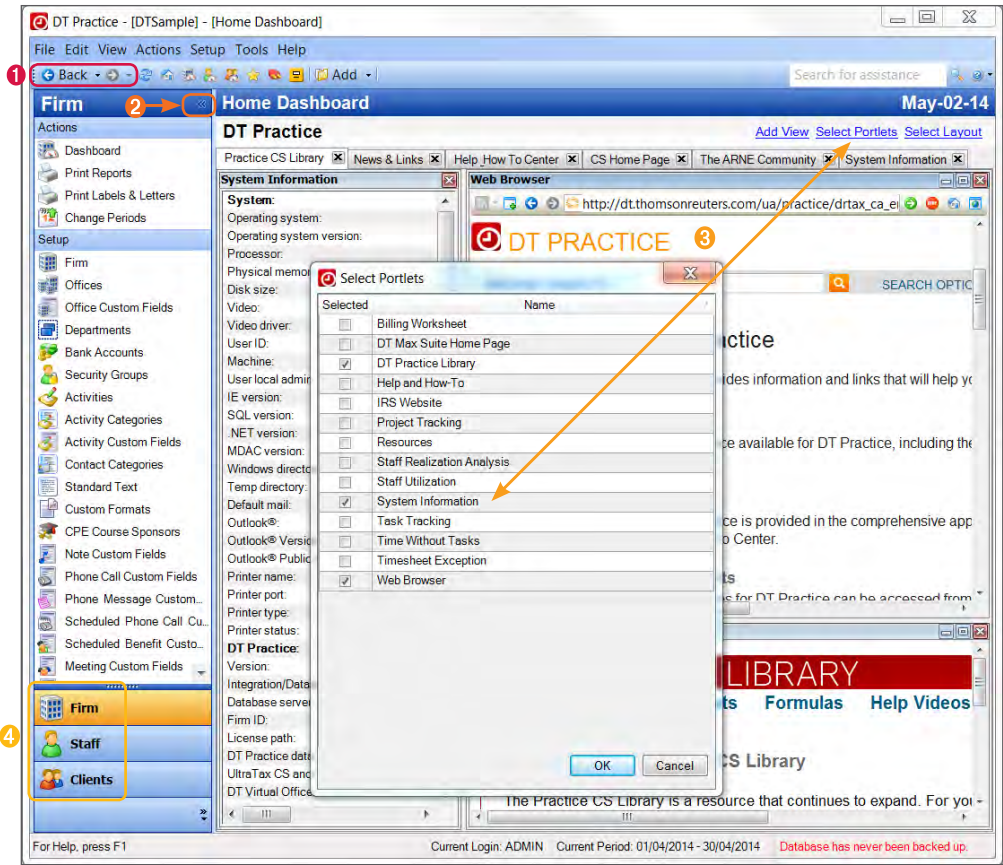
Designed with a familiar Microsoft® Outlook® appearance and feel, DT Practice offers browser-like navigation that enables you to move back and forth within the program with ease and efficiency.

You can use the left-hand navigation pane to quickly jump to different dashboards, actions, or setup options. If you prefer to use the top menu bar, you can hide the navigation pane.

DT Practice dashboards can be configured to fit the unique needs of your practice as well as the needs of each individual user. With at-a-glance views of key firm, client, and staff information, you can easily get an immediate snapshot of any detail relating to your practice, whenever you need it.

HOME DASHBOARD

The Home Dashboard is used to display frequently used portlets. These can include system information, the DT Practice News feed, RSS feeds, web pages, and many others.



FULLY CUSTOMIZABLE DIGITAL DASHBOARD

- 1 Use the browser-like navigation bar to quickly move forward and backward with one click.
- 2 Use the double arrow to display or hide the navigation pane.
- 3 Right-click the dashboard or click the Select Portlet link on the top right to show or hide portlets. Move or resize portlets within the digital dashboard to completely customize your display.
- 4 Quickly move between firm, client, and staff information.

FIRM DASHBOARD

SEE THE STATUS OF YOUR FIRM AT A GLANCE

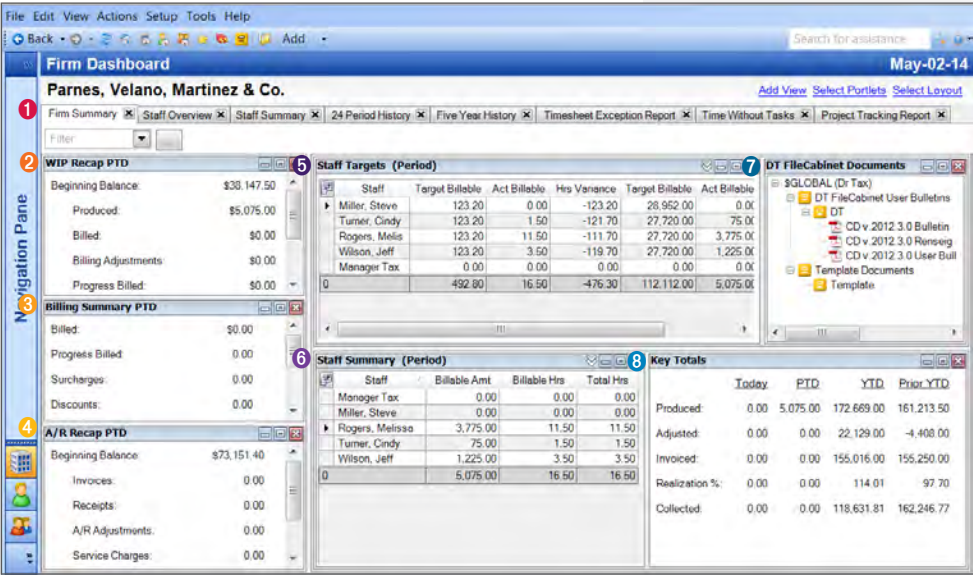
The Firm Dashboard provides a quick view of the state of your firm's production, billings, and staff productivity. This consolidated view makes it easy for you to quickly assess the financial status of your firm without having to search in multiple locations. To maintain security, you can restrict this view to partners and/or other selected employees.

Firm partners and other authorized staff can refer to the Firm Dashboard to review such items as:

- Key financial totals.
- Recaps of Work In Process (WIP) and accounts receivable.
- A summary of staff hours and billable time, as well as staff availability.
- Any standard or custom report—a report can be added to your dashboard as a portlet, allowing firm members to get real-time data on-screen—without having to print a report.

THE FIRM DASHBOARD—
YOUR FIRM'S FINANCIAL PICTURE

- 1 Use filtering and tabs to create multiple “views” of the data.
- 2 View a summary of billing activity.
- 3 See a recap of WIP, including an up-to-the-minute report on what's been produced, billed, and adjusted for the period-to-date.
- 4 Get a quick look at accounts receivable—including invoiced amounts, receipts, and more.
- 5 In the Staff Targets portlet, compare actual staff hours and billable amounts with targets to evaluate staff in real time and take corrective action to improve efficiency.
- 6 View a summary of staff hours, including total hours worked, billable hours, and billable amounts.
- 7 Access DT FileCabinet documents.
- 8 Access key totals, such as production, billings, and collections as of the current date, month-to-date, and year-to-date.



“Practice CS includes several dashboard views throughout the program. Each dashboard is fully customizable and may be as simple or complex as desired. Practice CS contains several predefined options, called portlets, that may be added at any time and firms may create their own portlets as necessary. All dashboard data is live and includes the most current information.”

– CPA Practice Advisor
July 2012



CLIENT DASHBOARD

CLIENT INFORMATION AT YOUR FINGERTIPS

DT Practice provides the tools to tighten the relationship between your firm and your clients. And the Client Dashboard is the one place where you can see everything that is going on with each client.

The Client Dashboard pulls together critical client information, including contact information, identifying data/information, work in process, billing activity, payment history, current balances, and more. The Client Dashboard also includes a Solutions portlet, which organizes all of the documents, applications, and online resources associated with specific clients.

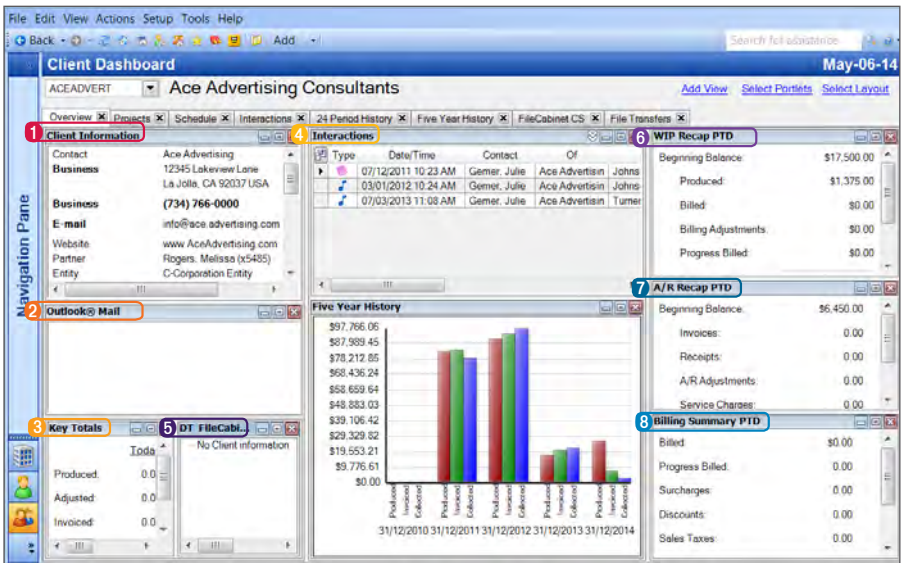
From the Solutions portlet, you can access:

- DT Professional Suite and any other programs that you use for each client.
- Any documents including Microsoft Office documents (e.g., Word and Excel® files).
- Shortcuts to frequently accessed websites or integrated online resources.

Using DT Practice in combination with the Client Management module (see pg. 16) ensures that you have the most current client information at your fingertips—enhancing your overall workflow. For example, from the Client Dashboard, you can display the Client Management Interactions portlet to create a comprehensive view of all interactions associated with a given client—including phone messages, emails, and notes.

THE CLIENT DASHBOARD— YOUR CLIENT INFORMATION AT A GLANCE

- 1 Access client profile information.
- 2 View email messages specific to the client you have open.
- 3 View key production invoice and collection totals.
- 4 View all interactions associated with a given client.
- 5 Access DT FileCabinet documents related to the selected client.
- 6 See a Work in Process Recap.
- 7 See an Accounts Receivable Recap.
- 8 See a Billing Summary.



STAFF DASHBOARD

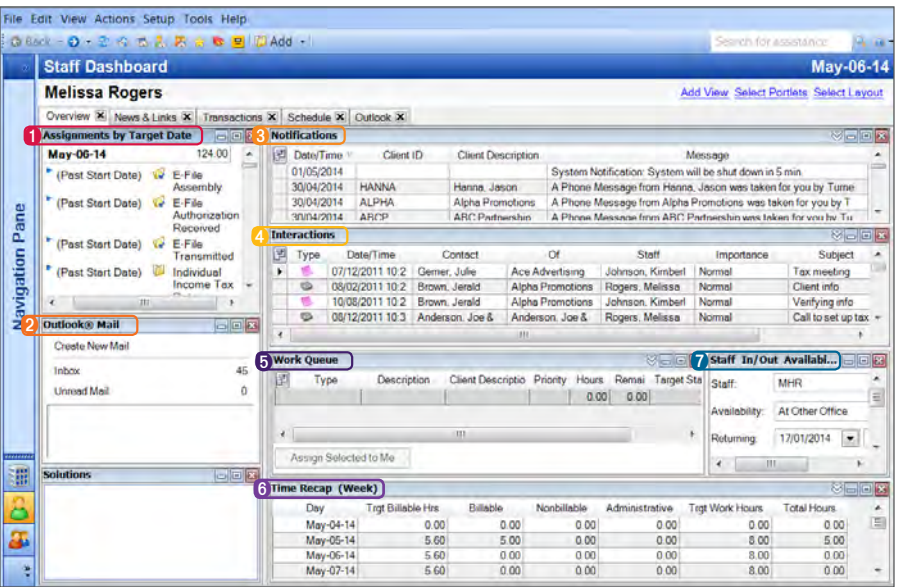
PERFORM ALL DAY-TO-DAY TASKS FROM A SINGLE LOCATION

The Staff Dashboard is designed to work seamlessly with all of your firm's applications, such as Microsoft Outlook Mail, Calendar, and Tasks, to provide a convenient workflow hub for your staff. The Staff Dashboard makes it easy for you and your staff to perform all of your daily tasks from one centralized location, rather than having to navigate multiple programs.

Your staff can customize the dashboard to their specific needs and refer to it to handle a variety of tasks, including:

- View Outlook Calendar, Mail, and Tasks.
- View a list of outstanding projects and tasks.
- View a schedule with assigned projects and tasks and Outlook appointments.
- Access DT FileCabinet documents (if licensed).
- View information for entered time.

Using DT Practice in combination with the Project Management module (see pg. 15), you can further streamline workflow. From the Staff Dashboard, your staff can view up-to-the minute project information. For example, the Notifications portlet displays key information for staff, such as assigned projects and tasks, approaching deadlines, or when client information has been received.



THE STAFF DASHBOARD

- 1 View a complete schedule, including Outlook appointments.
- 2 Link directly to your Outlook email.
- 3 View critical notifications.
- 4 View all interactions for the selected staff.
- 5 View staff work queue.
- 6 View a time recap of your billable, nonbillable, and administrative time totals.
- 7 Use the Staff In/Out Availability portlet to enter your availability, so other staff members can see when you'll be in or out of the office.

PROGRAM SETUP

USE A STANDARD FORMAT OR CUSTOMIZE TO MEET YOUR FIRM'S NEEDS

Dozens of flexible setup features enable you to tailor DT Practice to meet the needs of your firm—rather than changing your practice to fit your software.

- You can:
- Set up your own **user preferences** to specify how data entry fields are handled.
 - Add your own **custom fields** for creating specific report groupings.
 - Add **custom filters** that give you the ability to limit data to your own preferred criteria.
 - Access **setup screens** whenever you need them by right-clicking and selecting from the context menu.
 - **Share client contact information** with other DT Professional Suite programs to eliminate redundant data entry.
 - **Track an unlimited number of contacts** for staff, clients, and your offices.

ASSIGN MULTI-LEVEL SECURITY

Set up multi-level security in DT Practice to meet your firm's specific needs. You can create specific security groups such as staff, managers, partners—or any designation you prefer.

This security feature enables you to control the level of information available to your staff, including what they can view on dashboards.

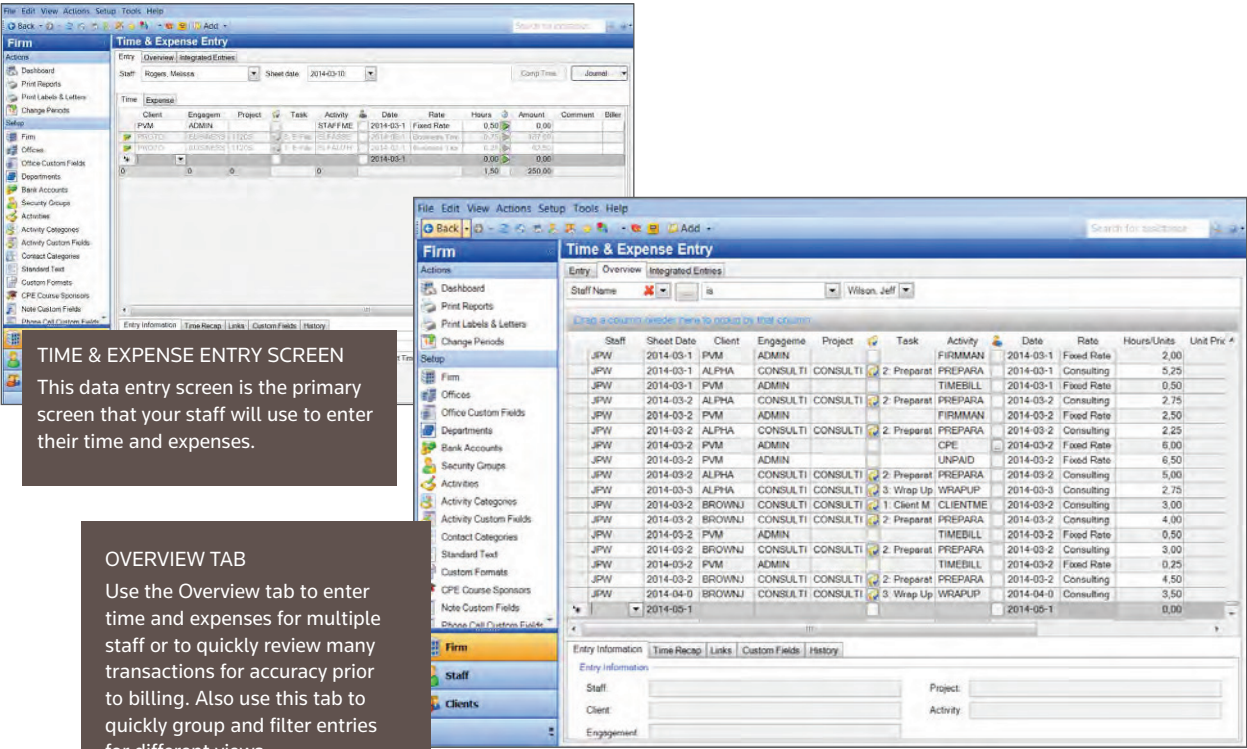
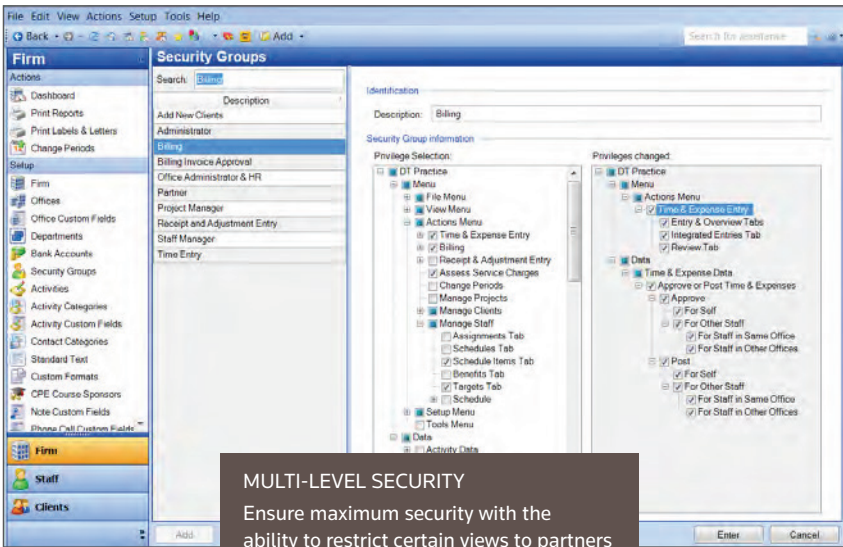
TIME AND EXPENSE ENTRY

STREAMLINE TIME ENTRY TO KEEP IT SIMPLE AND FAST

DT Practice makes time entry fast and easy for your staff with tools to ensure that time is recorded accurately, so there's no time wasted correcting mistakes.

The advanced time and expense entry options in DT Practice enable you to:

- Use **one or more timers** to capture time as it happens. When a solution is launched from a project or task on the dashboard, DT Practice opens the client and starts the timer.
- Have virtually **unlimited filtering capabilities**, such as client, engagement, staff, date, activity, and more.
- **Maintain an audit trail** of any changes made to time and expense transactions.
- **Change the order of time entry fields** to match your data entry needs.
- Customize the data entry screen with **flexible user preferences** that allow you to specify field defaults and skip or hide unused fields.
- Enter **negative WIP and expenses** for adjustment purposes.
- Select from **two input screen views**—one providing a single-sheet entry style that separates time and expenses, and the other allowing entry across multiple sheets for both time and expenses.
- Add comments or notes for the biller with **convenient comment fields** that are available within each entry.
- **Enter time in minutes or hours** depending on your user preference settings.
- **Track time with a desktop timer** that appears on top of any other applications you have open.
- **Print the Time Entry Journal** for the current timesheet, which can be used for payroll purposes.
- Allow staff to **enter time remotely** even when not connected to the Internet.



BILLING

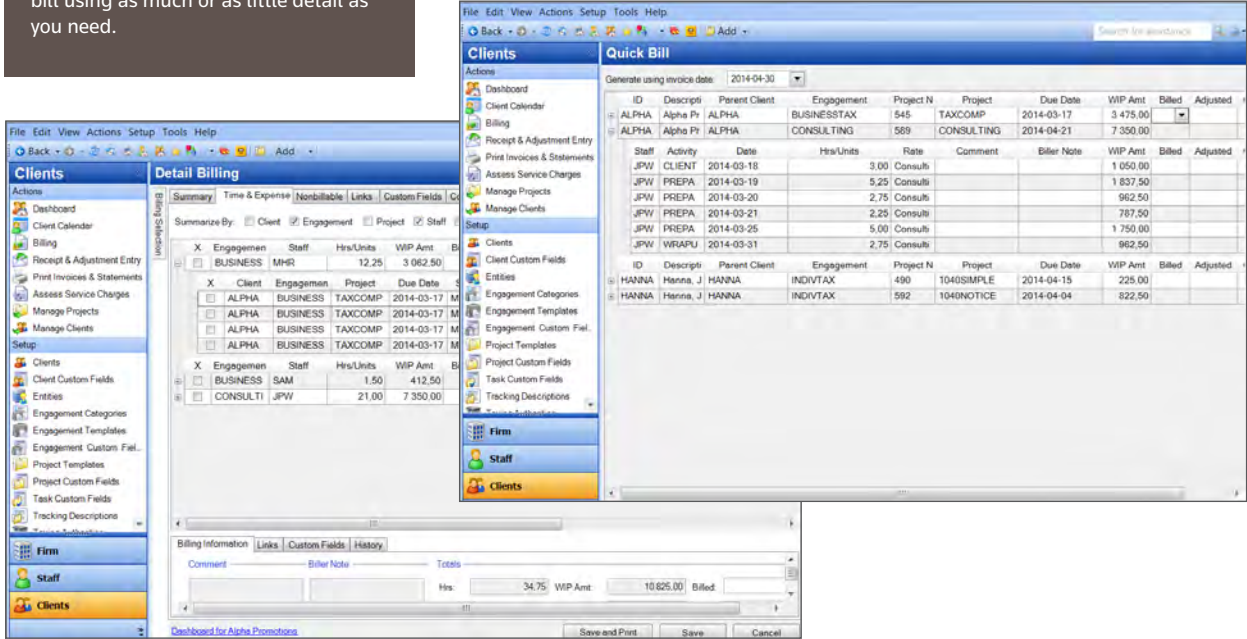
MAXIMIZE YOUR TIME AND PROFITS WITH EFFICIENT BILLING

The billing system in DT Practice is comprehensive yet flexible enough to handle everything from basic billing functions to complex billing scenarios. You can:

- Select from four different billing methods, including:
 - **Detail Billing**—Bill clients at detail or summary level.
 - **Quick Bill**—Bill multiple clients for specified amounts on a single screen.
 - **Standard Bill**—Bill multiple clients for the standard WIP amount with a single mouse click.
 - **Zero Bill**—Bill selected clients’ engagements at zero.
- Use the **Smart Bill** feature to bill multiple time and expense entries at one time with automatic allocation of billing and adjustment amounts.
- Bill clients at your convenience as often as you choose, by any method you prefer.
- Bill by project, activity, staff, or individual WIP item.
- Use the powerful filtering capabilities in the selection screen to easily select which clients to bill.
- Use the **optional review feature** to approve and post invoices.
- Add an **invoice note** for future reference or staff review.
- Create a **single invoice for a parent client** when a client family is selected.
- Use the Compose tab to **make changes to the detail section** of an invoice, including:
 - Adding new rows with or without sub-rows
 - Adding free-form text
 - Deleting unwanted rows
 - Changing dollar amounts to reflect detail
- Output invoices to multiple formats, including DT Client Portal, DT FileCabinet, Adobe® Acrobat® PDF, HTML, Rich Text Format, Text, Tagged Image File, Microsoft Excel, and email.
- Generate invoices for clients that are billed on a recurring basis.
- Create progress billings so client invoices can be generated before the time and expenses for the work are entered.

FLEXIBLE BILLING

DT Practice can accommodate a variety of different billing methods and lets you bill using as much or as little detail as you need.



INVOICES AND STATEMENTS

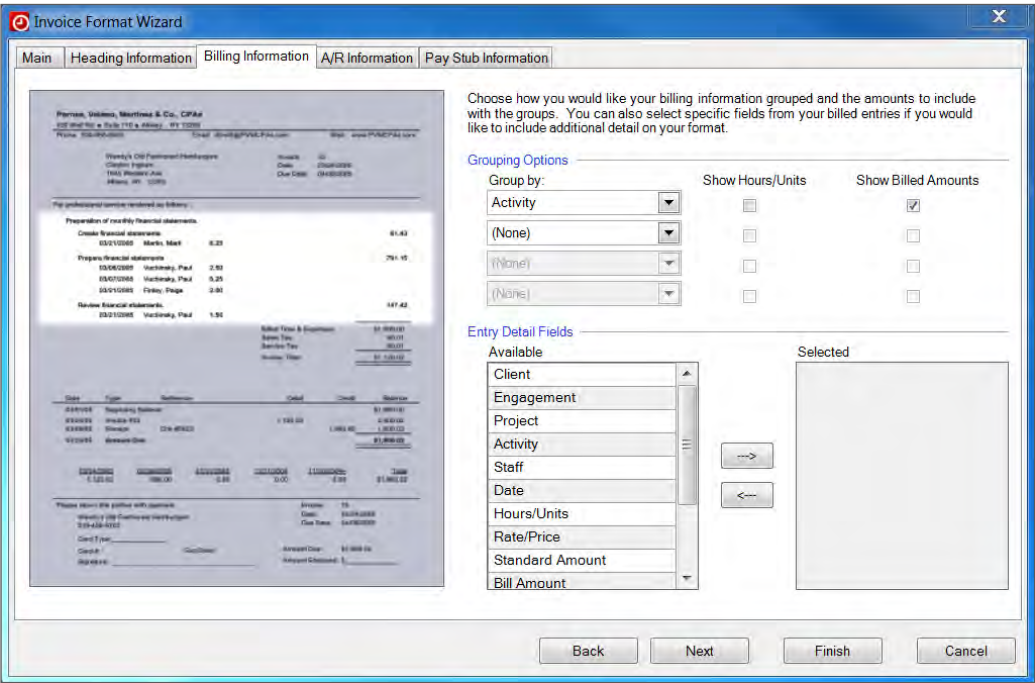
USE FAST, EASY INVOICE AND STATEMENT FORMATTING

The flexible Invoice and Statement Format Wizards in DT Practice make it easy to create invoices and statements for your clients in just minutes. You can:

- Quickly set up your invoices or statements using the easy-to-use formatting capabilities that are built into the program.
- Control the level of detail you show your clients using flexible grouping capabilities.
- Easily add A/R Aging, Ledger, and Recap sections as needed.
- Add dunning messages that allow you to display previous balance reminders to your clients based on the age of their outstanding balance.
- Include a pay stub at the bottom of your invoice.
- Add a technology surcharge or a discount to invoices.

EASY-TO-USE INVOICE AND STATEMENT WIZARD

Quickly create invoices and statements that meet your specifications.



POWERFUL AND FLEXIBLE REPORTING

GAIN VALUABLE INSIGHT WITH COMPREHENSIVE REPORTING

The robust and flexible reporting capabilities within DT Practice enable you to quickly access and print detailed information about your firm, clients, and staff that will help you gain valuable insight into your business.

The comprehensive reporting features enable you to:

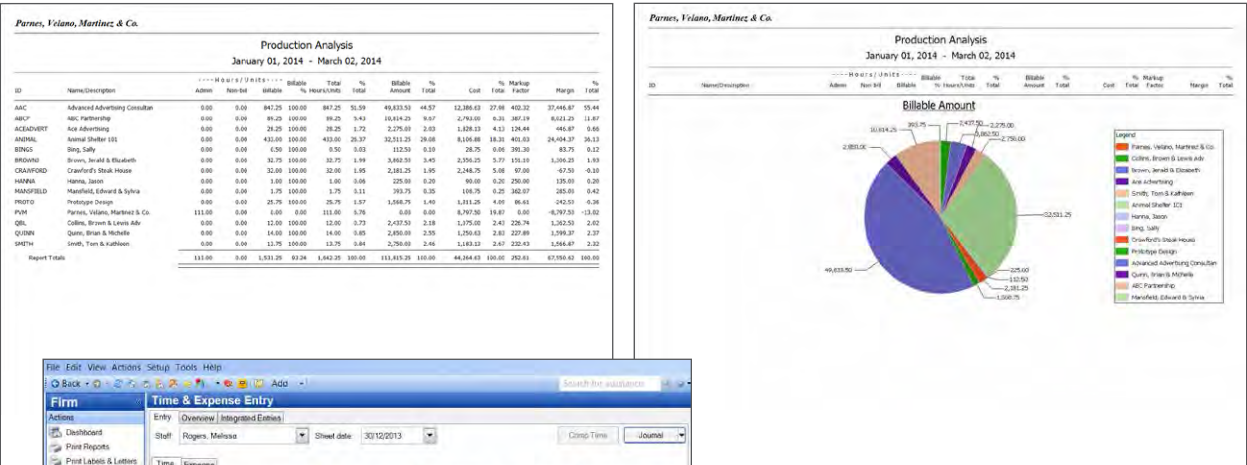
- Pull standard or custom reports onto any dashboard, giving staff access to real-time information.
- Use powerful filtering capabilities to identify clients and staff members based on any criteria.
- Select the detail and groupings for each analytic report, such as by client, engagement, staff member, activity, or other, with appropriate subtotals.
- Use the Print Preview Find feature to quickly locate specific details.
- Drill down within each report to view and even modify underlying sources of data.
- Output and email different types of files, like Adobe PDF, HTML, Rich Text Format, Text, Tagged Image File, and Microsoft Excel.
- Easily send reports to DT FileCabinet.
- Create profiles for frequently used reports to automate the reporting process.
- Create custom reports.
- Display any report (standard or custom) on a dashboard for real-time review.
- Access the DT Practice Library Portlet to view and download a variety of report formats.

STANDARD REPORTS PROVIDE IMMEDIATE INFORMATION

Report types include these categories, as well as 150+ custom formats in the DT Practice library:

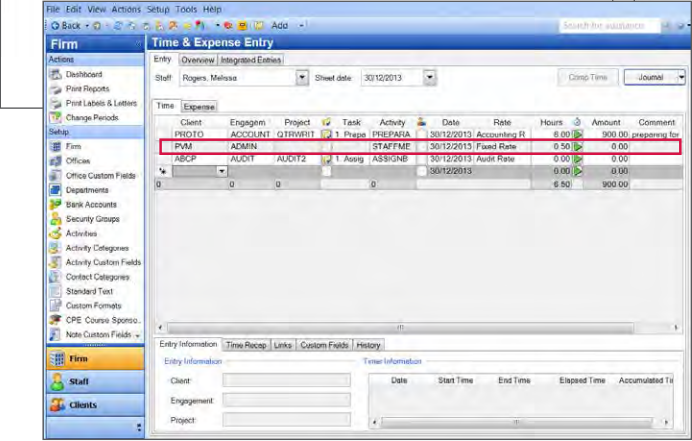
- Listing Reports
- Production Reports
- Billing Reports
- Collection Reports
- Reconciliation Reports

And to enhance visual representation, you can choose to include charts on several standard reports.



Production Analysis
January 01, 2014 - March 02, 2014

ID	Name/Description	Admin	Non-Adm	Billable	Total	%	Billable Amount	Total	%	Cost	% Markup	Margin	%	
SAC	Advanced Advertising Consultant	0.00	0.00	842.25	100.00	842.25	50.59	48,834.59	48.57	12,386.03	27.08	402.33	37,448.57	55.46
ABC	ABC Partnership	0.00	0.00	89.25	100.00	89.25	5.43	18,514.25	9.57	2,760.00	6.36	367.19	8,754.25	11.87
ACQUINERT	Acq Advertising	0.00	0.00	28.25	100.00	28.25	1.72	2,275.00	2.03	1,028.23	4.13	126.44	1,148.77	5.65
AMNBL	Amnbl Media LLC	0.00	0.00	433.00	100.00	433.00	26.37	32,313.20	29.68	8,105.48	18.91	483.53	24,207.72	36.13
BINGUS	Bing, Sally	0.00	0.00	6.50	100.00	6.50	0.03	112.50	0.39	28.75	0.06	28.38	83.75	0.12
BRUNO	Bruno, David & Elizabeth	0.00	0.00	32.50	100.00	32.50	1.99	3,862.50	3.45	2,356.25	5.77	151.10	1,506.25	1.93
CHAMPED	Champion's Steel House	0.00	0.00	32.00	100.00	32.00	1.95	2,181.25	1.90	2,246.75	5.68	87.00	-67.50	-0.39
HAWFA	Hanna, Jason	0.00	0.00	1.00	100.00	1.00	0.06	225.00	0.29	90.00	0.20	235.00	135.00	0.20
HANFEDLO	Hanfield, Edward & Sylvia	0.00	0.00	1.75	100.00	1.75	0.11	293.75	0.26	150.75	0.25	243.00	243.00	0.42
PRODIO	Prodesign Design	0.00	0.00	25.75	100.00	25.75	1.57	1,064.75	1.40	1,111.25	4.00	86.41	142.51	0.36
POM	Parnes, Vilano, Martinez & Co.	113.00	0.00	0.00	100.00	113.00	6.90	8,792.50	19.87	0.00	-6,792.50	-13.02		
QBL	Quinn, Brian & Michelle	0.00	0.00	12.00	100.00	12.00	0.73	2,037.50	2.39	1,170.75	2.41	256.78	1,266.75	2.65
QUINN	Quinn, Brian & Michelle	0.00	0.00	14.00	100.00	14.00	0.85	2,450.00	2.35	1,250.43	2.83	227.89	1,199.57	2.37
SMITH	Smith, Tom & Kathleen	0.00	0.00	13.75	100.00	13.75	0.84	2,750.00	2.46	1,433.12	2.67	220.43	1,316.88	2.02
Report Totals		113.00	0.00	1,551.25	93.34	1,664.25	100.00	113,457.20	100.00	44,344.43	100.00	250.53	67,112.77	100.00



Time & Expense Entry
Staff: Rogers, Melissa | Sheet date: 3/12/2013 | Comp Time | Journal

Client	Engagem	Project	Task	Activity	Date	Rate	Hours	Amount	Comment
PRODIO	ACCOUNT	QTRADVERT	1	Project	3/12/2013	900.00	1.00	900.00	unassigned fee
POM	ADMIN			STAFFME	3/12/2013	Fixed Rate	0.50	0.00	
PRODIO	AUDIT	AUDIT2	1	Audit	3/12/2013	Audit Rate	0.00	0.00	
				ASSIGNB	3/12/2013		0.00	0.00	
					3/12/2013		0.50	900.00	

DRILL DOWN MULTIPLE LEVELS

Drill down in reports to view and modify the underlying source of data. Here you see the time and expense entries that led to a billable amount on the Production Analysis report. If desired, you could also drill down on the Time and Expense Listing report to access the data where it was entered—and even edit the source data, if needed.

CUSTOM FORMAT DESIGNER

DESIGN THE REPORTS, INVOICES, STATEMENTS, LABELS, AND LETTERS NEEDED FOR YOUR FIRM

Custom Formatting is built into DT Practice to give you the flexibility you need to produce communications quickly and easily. With the easy-to-use custom formatting options, DT Practice allows you to create and modify existing standard formats, including content, layout, and appearance, and lets you create new invoices, statements, reports, labels, and letter formats to meet the daily needs of your firm.

The Custom Format Designer makes it easy to customize layouts and add rows, columns, and information for the presentation you desire.

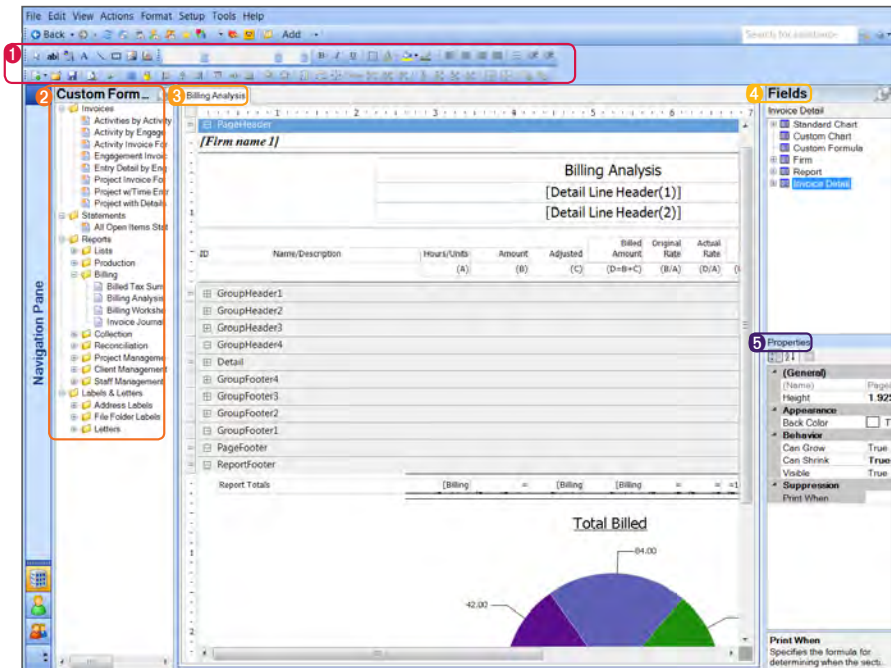
The Custom Format Designer allows you full control to:

- Click and drag from a list of available fields and properties.
- Design multiple items simultaneously with the tabbed view.
- Control formatting options for fonts including size, color, bold, italics, strikeouts, and underlining.
- Use Rich Text with additional formatting.
- Add lines, photos, logos, and watermarks.
- Preview the item you are designing with live data as you work.
- Import and export formats.
- Pull custom fields into a custom format.
- Build calculated totals based on multiple fields.
- Include a visual representation of your data by adding customized charts to custom and standard reports using the Charts Wizard.

CUSTOM FORMULA EDITOR—SHOW WHAT YOU WANT, THE WAY YOU WANT IT

The Custom Formula Editor lets you add calculated fields to custom formats. This editor makes it easy to modify calculations that are critical to analyzing procedures. You can:

- Select fields and enter amounts to create custom formulas.
- Add, subtract, multiply, divide, and create conditional expressions.
- Save your custom formulas for use with other reports.



The screenshot shows the Custom Format Designer interface with a Billing Analysis report template. The interface includes a navigation pane on the left, a central workspace with a table and a pie chart, and a right-hand pane with fields and properties. The table has columns for Name/Description, Hours/Units, Amount, Adjusted, Billed, Original Rate, and Actual Rate. The pie chart is titled 'Total Billed' and shows a distribution of values. The right-hand pane has tabs for Fields, Properties, and Print When.

CUSTOM FORMAT DESIGNER – EASY-TO-USE TOOLS FOR CREATING REPORTS AND COMMUNICATIONS

- 1 Familiar formatting controls allow you to change font and size, as well as add shapes and pictures.
- 2 Access the standard list of documents for customization.
- 3 Tabbed view allows you to customize multiple documents simultaneously.
- 4 Access a list of available fields for easy drag and drop into the document you are creating.
- 5 Set properties for the printing, appearance, and other customizable properties of a document.

ACCOUNTS RECEIVABLE PROCESSING

STAY ON TOP OF YOUR CASH FLOW

“As IT Manager, I appreciate the performance we get from the SQL database technology built into Practice CS. Because it is so easy to navigate, it takes very little time to train staff for the use of time entry and this enables us to capture all billable activities. We use Practice CS on a daily basis to insure accurate up to date WIPs in our firm.”

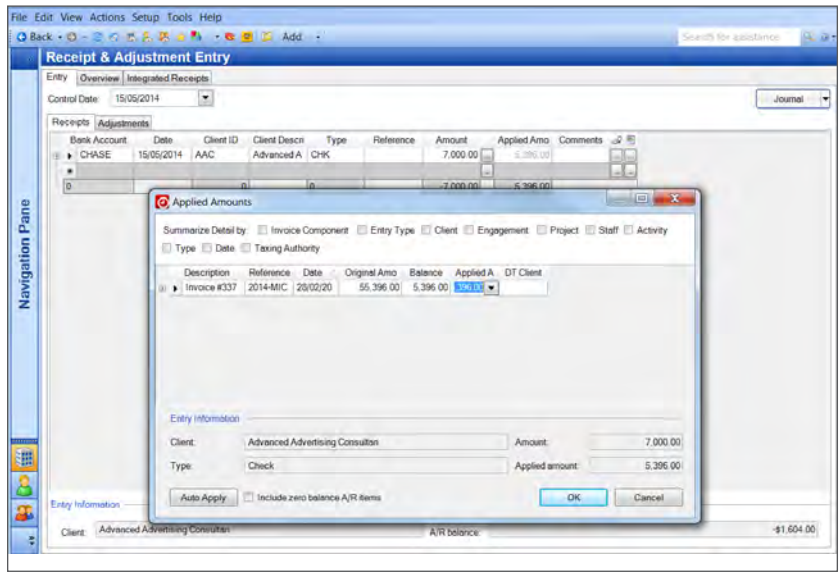
– Lawrence Brault IT Director,
PSB Boisjoli S.E.N.C.R.L.-LLP

- DT Practice can help you maintain accounts receivable quickly and easily, enabling you to:
- Enter receipts and apply them manually or automatically to outstanding balances.
 - Enter different adjustment types, including credit memo, credit card return, debit memo, non-sufficient funds, and write-offs.
 - Select from two different entry styles when entering receipts and adjustments—you can enter daily or in overview mode that displays multiple dates.
 - Use the optional review process to require that all entries be approved and posted before inclusion in firm reporting, invoices, and statements.
 - Print a journal of receipts and adjustments from the entry screen.
 - Create service charges for overdue accounts.
 - Send customized statements to clients showing the status of their accounts.

DT CLIENT PORTAL EXPANDS ONLINE CLIENT COLLABORATION

You can quickly and easily create private, secure client portals in DT Practice to improve the service experience for your clients and save time for your firm. You can transfer files back and forth, request files, create new portals, offer your clients the option to provide their signatures electronically, and more.

QUICK RECEIPT APPLICATIONS
DT Practice makes it easy to quickly apply amounts to specific invoices. In the Applied Amounts dialog, you can use the Applied field to specify amounts to be applied to each outstanding invoice, or click the Auto Apply button to apply the adjustment automatically to the oldest invoices first.



PROJECT MANAGEMENT

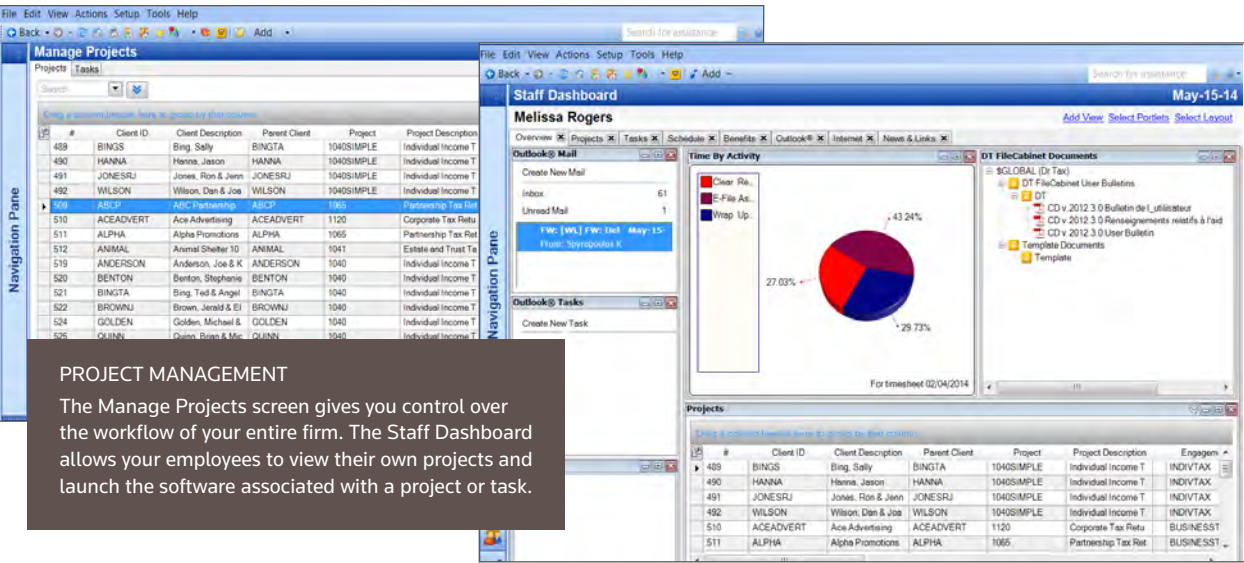
MANAGE YOUR FIRM’S WORKFLOW

With the optional add-on capabilities of the Project Management module, you can track and monitor due dates, and manage and track your firm’s projects and tasks right from your own desktop—giving you unprecedented control over your office workflow. You can also give your staff (via their Staff Dashboard) the tools to efficiently manage their individual responsibilities.

Using DT Practice with Project Management, you can:

- Save time by setting up **project templates** that hold default information for project creation.
- Import project templates from a pre-defined list for quick setup.
- Set up **notifications to inform staff** members when client information for a project has been received, assignment changes are made, or when due dates have been changed or extended.
- Control how recurring projects should be generated with **flexible project generation**.
- Create **user-defined recurrences**.
- Enable staff to **manage project responsibilities** from the Staff Dashboard by viewing assigned projects and tasks.
- View Outlook appointments, tasks, projects, and project tasks in an Outlook-style calendar.
- Launch applications needed to complete projects from within DT Practice simply by clicking a project or task solution to **have your work timed automatically**.
- Track **actual vs. budget information** to determine how your staff is progressing on a project.
- Use the Manage Projects screen to **update project and task information**, assign work, and review your own workload.
- **Group/filter reports, enter time/expense, and bill clients** by project.
- Track additional data on projects and tasks using an **unlimited number of custom fields**.
- Use the “links” capability, to associate files, folders, web pages, and DT FileCabinet documents with projects and tasks.

- Available Project Management reports include:
- List of Project Templates
 - Project Budget to Actual
 - Project Listing
 - Project Tracking
 - Routing Sheet
 - Task Budget to Actual
 - Task Tracking



PROJECT MANAGEMENT
The Manage Projects screen gives you control over the workflow of your entire firm. The Staff Dashboard allows your employees to view their own projects and launch the software associated with a project or task.

CLIENT MANAGEMENT

ACCESS UP-TO-THE-MINUTE INFORMATION ON ALL YOUR CLIENTS FROM ONE LOCATION

By always keeping the most updated client information at your fingertips, the optional add-on Client Management module features provide CRM capabilities that tighten your relationships with clients and prospects and enable you to offer better service. Because you communicate in many ways, including phone calls, emails, invoices, and face-to-face contact, a system that tracks every client interaction and monitors every client activity is a must. Client Management lets you logically organize, store, and access all client interactions in a single location for quick and efficient review—by anyone on your staff, at any time.

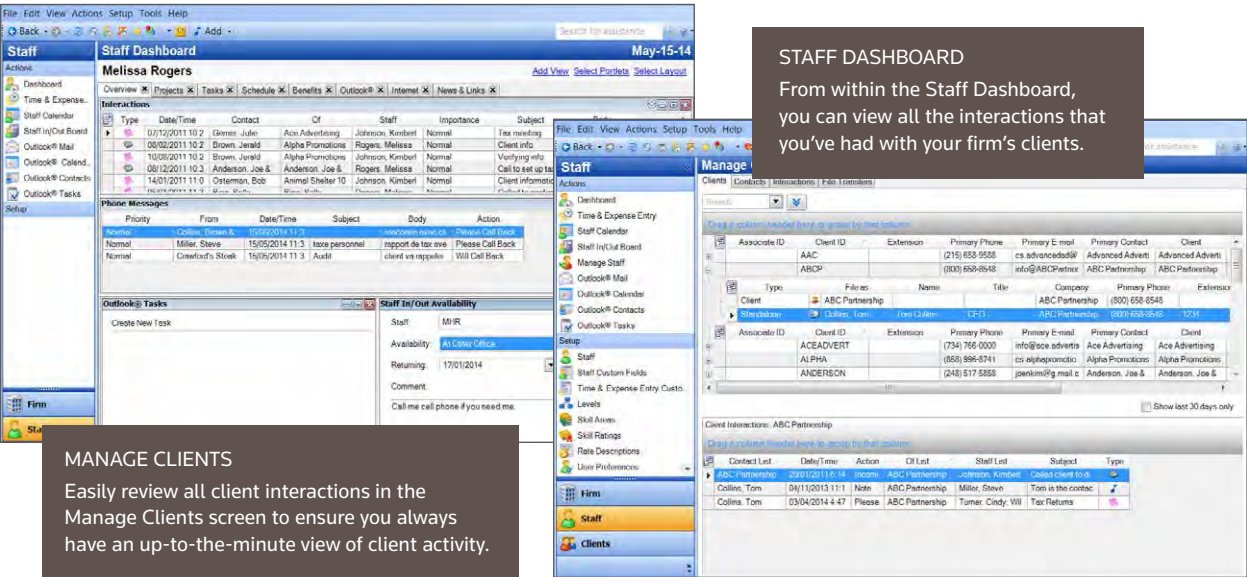
Using DT Practice with Client Management, you can:

- **Customize your view of client and contact data** to meet your firm's specific needs.
- **Record notes** of every client interaction, including phone calls, emails, billing, or face-to-face meetings.
- **Access a contact list** and view information for all contacts at one time.
- **Synchronize contact information in real time with Outlook**, offering you the most up-to-date contact information in both applications.
- **Automatically track time on phone calls**, which can be invoiced with other billable time.
- **Record and track prospects won/lost information**, which allows you to determine why you are winning or losing prospective clients.
- **Track how new clients are referred** to your firm.
- **Generate virtually any report** grouped by referral source, giving you a complete picture of referral activity.
- **View interactions by client, contact, or staff** to stay apprised of all firm activity.
- **Record phone messages**, which show up on the Staff Dashboard, and send a notification, providing a digital record of all phone messages.

- **Print reports of all historical client and contact activity** for quick, efficient review.
- **Send or receive files securely** with the option to request an electronic signature from your client via an easy-to-use file transfer feature that connects directly to DT Client Portal.

Available Client Management reports include:

- Clients Won
- Clients/Prospects Lost
- Interaction Listing



MANAGE CLIENTS
Easily review all client interactions in the Manage Clients screen to ensure you always have an up-to-the-minute view of client activity.

STAFF MANAGEMENT

MANAGE STAFF BENEFITS, TARGETS, AND SCHEDULES FROM ONE LOCATION

The Staff Management module can help firms of all sizes become more efficient and optimize current and future staff performance. With Staff Management, you can quickly and easily manage and track staff benefits and comp time, staff budgeting and targets, staff scheduling, and more—all with total control.

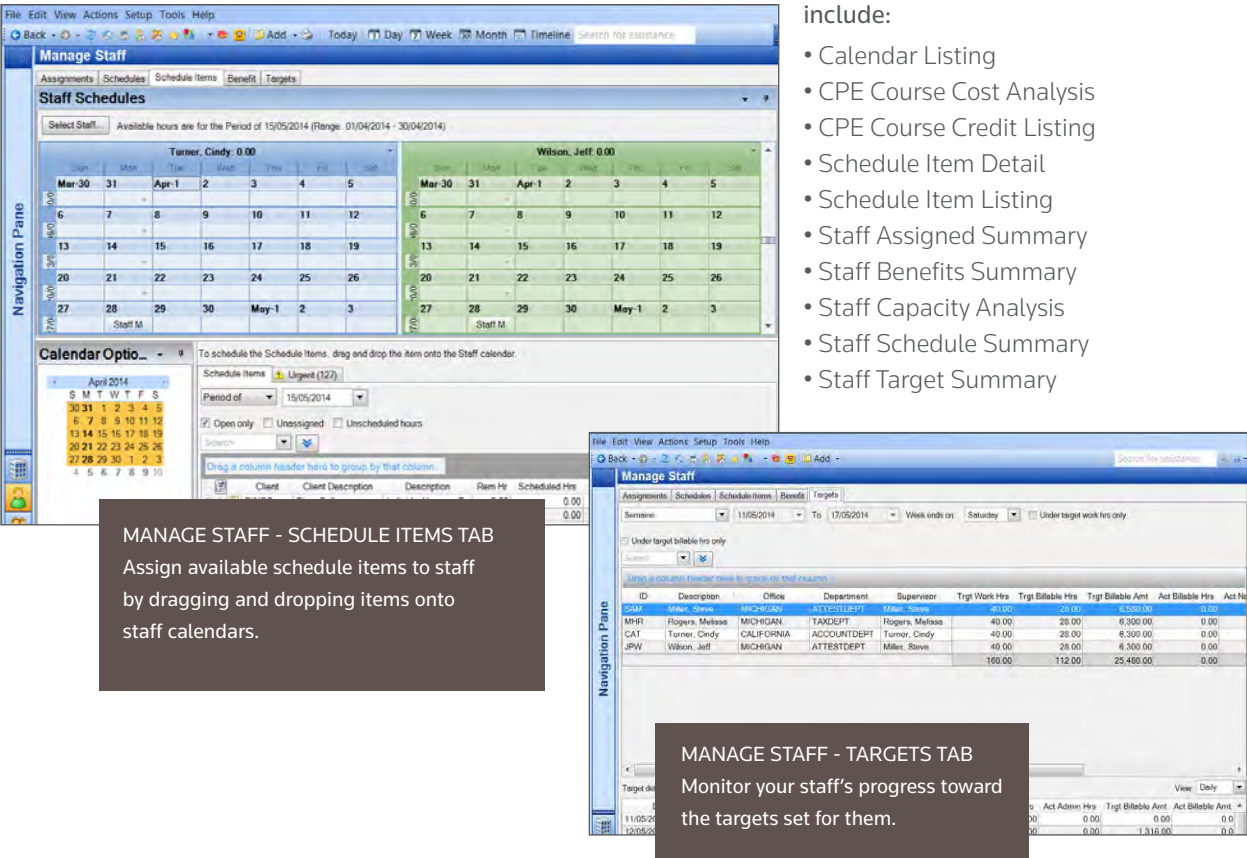
Using DT Practice with Staff Management, you can:

- **Maintain staff benefits automatically** with program-generated accruals, automated balance reductions via time entry, and automatic adjustments for annual carryover rules.
- **Track accruable benefits**, comp time, and firm holidays.
- **Set accrual allowances** to be fixed based on months of employment or based on staff levels.
- **Provide staff with benefit balances**, projected accruals, and “to use” hours based on carryover rules.
- **Enable supervisors to view time-off requests** and approve or deny them.
- **Set up per-staff targets** and view targets versus actual results.

- **Manage staff assignments**, including phone calls, benefits, meetings, and to-do items by ranking them in the order you want the assigned staff to work on them.
- **Define staff qualifications** for schedule items and work queues.
- **View staff workloads and drag and drop schedule items** onto Staff Calendars to assign and schedule additional work.
- Define the criteria that **make schedule items urgent** and choose to view these separately.
- **Enable staff to view their schedules**, workloads, and items in the work queue.
- **Set reminders** for all schedule items.

Available Staff Management reports include:

- Calendar Listing
- CPE Course Cost Analysis
- CPE Course Credit Listing
- Schedule Item Detail
- Schedule Item Listing
- Staff Assigned Summary
- Staff Benefits Summary
- Staff Capacity Analysis
- Staff Schedule Summary
- Staff Target Summary



MANAGE STAFF - SCHEDULE ITEMS TAB
Assign available schedule items to staff by dragging and dropping items onto staff calendars.

MANAGE STAFF - TARGETS TAB
Monitor your staff's progress toward the targets set for them.



DT PRACTICE MOBILE

ON-THE-GO-ACCESS TO YOUR FIRM DATA ON YOUR iPhone®, iPad®, AND ANDROID™ DEVICE

Manage your firm from anywhere. DT Practice Mobile is an app for your mobile device that lets you access the key indicators you use to make decisions and run your practice every day. It's the easy option to get important firm information on your Apple® iPhone, iPad, iPod touch®, or Android™ device.

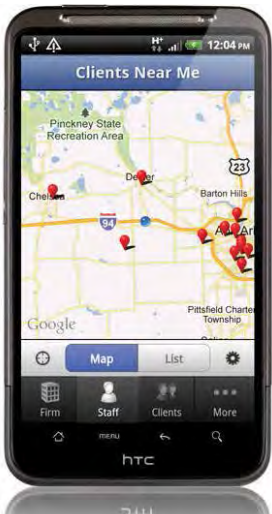
Exclusively for tax and accounting professionals – the DT Practice mobile app gives you on-the-go access to important firm, staff, and client data 24/7, from anywhere. The information automatically flows directly into DT Practice where you can view it and other important DT Practice data to help you make smart business decisions on the spot. Stay connected and in control of your bottom line with key features, such as:

- **Staff Availability** – Check staff work load, phone messages, contact information, and notifications.
- **Firm Financials** – Monitor your firm's finances and your investment in individual clients through WIP Recap, A/R Recap, Key Totals, and Five-Year History.
- **Staff Active Timers** - See exactly what your staff is working on.
- **Time Recap**, assigned Projects and Tasks, and Notifications - Stay on top of your responsibilities and productivity.
- **Kilometre Tracking** - Track kilometres in real time using GPS or after-the-fact by mapping a route between two addresses and use that distance to calculate an expense entry.
- **Receipt Tracking** - Automatically link device photos of receipts to expense entries that flow to DT Practice and let firm members and/or administrators view receipts directly from time and expense entry.
- **Call Timer** - Time outgoing calls and use the dialed number to create a time entry.

FIRM KEY TOTALS
Review project, adjusted, invoiced, and collected amounts for today, period-to-date, and year-to-date, including pie charts.



CLIENTS NEAR ME
Find out if clients are close to your current location and make the most of your time when you are in a specific area.



COMPREHENSIVE TRAINING AND CONSULTING OPTIONS

MAKE THE MOST OF YOUR SOFTWARE INVESTMENT AND MAXIMIZE FIRM PRODUCTIVITY

The DT Professional Suite offers a selection of services that can help you get more out of your software investment, including :

Consulting Services

Custom Training

Standard Training



STANDARD TRAINING

Our web training is a great way to bring new staff up to speed or enable experienced staff to revisit specific topics, and/or supplement custom training or consulting. Our web training consists of live training taught by our professional instructors and delivered to your office via the web.

CUSTOM TRAINING

To ensure that you receive the appropriate training solution for your firm, we offer affordable custom training services that can be tailored to your firm's specific needs. Custom training is taught by our professional instructors, and can be delivered either via web training or through an onsite engagement in a physical classroom setting. We will work closely with you to define the topics, level of proficiency, number of participants, and training timeline that will accommodate your needs.

CONSULTING SERVICES

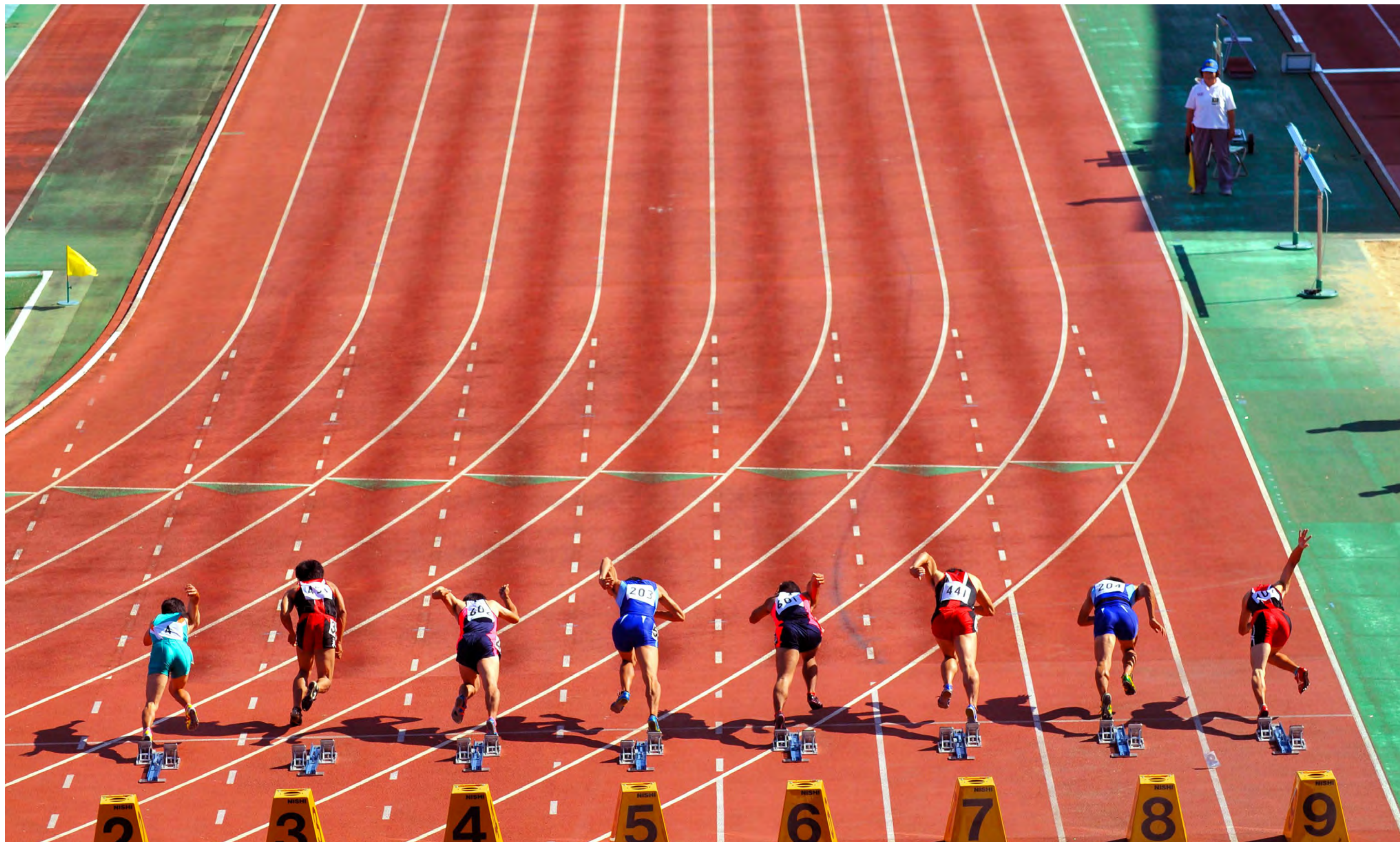
With a broad range of firm-wide and product-specific consulting services, our trained consulting professionals can analyze your firm's workflow processes, provide best practices, and help you develop a successful implementation and rollout strategy for your DT Professional Suite software, as well as other Thomson Reuters tools. Our implementation plan can include software configuration and setup, project management, and any necessary training for you and your firm.

We consider your firm's technical, procedural, and cultural needs to streamline and standardize your processes and maximize the efficient use of Thomson Reuters software. We can also provide business efficiency consulting to evaluate the workflow and processes of your entire firm, helping you increase efficiency and profitability across the board.

Consulting service offerings include:

- Product Implementation Consulting
- Business Workflow Consulting
- Product Optimization Consulting

For more information on training, consulting, or to register for courses, visit our website, DTPractice.ca. Or, contact us via email at DT.Sales@ThomsonReuters.com or by phone at 1 866 653-8629.



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